

Message Text

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ACTION OES-07

INFO OCT-01 EUR-12 ISO-00 ACDA-12 IO-13 SOE-02 CIAE-00
INR-10 L-03 NSAE-00 NSC-05 EB-08 NRC-05 DODE-00
SS-15 SP-02 CEQ-01 OIC-02 AF-10 ARA-10 EA-10
NEA-11 PM-05 COME-00 EPA-01 INT-05 /150 W
-----085417 061711Z /53

R 071512Z JUN 78
FM AMEMBASSY VIENNA
TO SECSTATE WASHDC 6670
INFO USDOEHQ WASHDC
USDOEHQ GERMANTOWN

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USIAEA

DEPT PASS IO/SCT, S/AS, OES AND ACDA
DOE PASS IA, AMMONS, BENGELSDORF, MOSS, GIAMBUSSO, AND
SCHWENNESEN

E.O. 11652: N/A
TAGS: IAEA, TECH, ENRG
SUBJECT: INFCE: WORKING GROUP 1 MEETING

1. JOINT FORECASTING SUB-GROUP 1A/2A, CHAIRED BY COATES
OF FRANCE, MET MAY 31, 1978, TO RECEIVE AND CONSIDER
RESPONSES TO SUB-GROUP QUESTIONNAIRE ON PROJECTED NUCLEAR
POWER GROWTH. U.S. TABLED ITS PRELIMINARY RESPONSE FOR
PERIOD 2000-2025. TWENTY-THREE COUNTRIES HAD RESPONDED BY
MAY 31. QUANTITY, AND APPARENT QUALITY, OF INPUT AND
PERIOD FOR WHICH PROJECTIONS WERE MADE VARIED WIDELY.
HOWEVER, EXCLUDING U.S., THE SUM OF "LOW" FORECASTS FROM
OTHER COUNTRIES WOULD SUGGEST TOTALS NOT GREATLY DIFFERENT
FROM RECENT OECD/NEA "RED BOOK" PRESENT TREND CASE, A
LEVEL U.S. BELIEVES IS UNLIKELY TO BE ACHIEVED.

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REPORTING COUNTRIES WITH SIGNIFICANT NUCLEAR POWER PRO-
GRAMS PRESENTING FORECASTS LIKELY TO BE QUITE HIGH INCLUDE
FRG, FRANCE, JAPAN, SPAIN, ITALY, KOREA. IAEA STAFF
SHOWED DELEGATION THEIR ANALYSIS TO BE TABLED AT IAEA
MEETING JUNE 6 THAT IS SKEPTICAL OF THESE HIGH PROJECTIONS
FOR IEA MEMBER STATES.

2. UK DELEGATE TABLED ANALYSIS OF SEVERAL WORLD ENERGY

DEMAND FORECASTS TO 2020 CONCLUDING THAT WORLD ENERGY CONFERENCE (WHICH GAVE VERY HIGH FORECASTS) MAY BE MOST USEFUL IN PROJECTING NUCLEAR POWER NEEDS. UK IN GENERAL TOOK STRONGEST POSITION IN FAVOR OF HIGH LONG-TERM FORECASTS.

3. UNDER THE CIRCUMSTANCES, THE U.S. DELEGATE TOOK THE POSITION THAT ADDITIONAL TIME WAS REQUIRED TO STUDY INPUT, RECEIVE ADDITIONAL INPUT, HARMONIZE "HIGH-LOW" ASSUMPTIONS BEFORE AGGREGATION OF NATIONAL FORECASTS INTO LIKELY REGIONAL AND WORLD TOTALS COULD BE ACCOMPLISHED. U.S. DELEGATE, WHILE STRESSING URGENCY OF EARLY DEVELOPMENT OF REALISTIC ESTIMATES, PROPOSED AND SUB-GROUP ACCEPTED THAT ABOUT SIX WEEKS BE PROVIDED FOR STUDY OF DATA.

4. SUB-GROUP MEETING SCHEDULED LONDON BEGINNING JULY 10 TO COMPLETE THE FOLLOWING SPECIFIC TASKS:

- A. PRODUCE AGGREGATE NUCLEAR POWER FORECASTS TO 2000 (PRELIMINARY FROM 1990 TO 2000) THAT WILL BE THEN PROVIDED TO OTHER WORKING GROUPS;
- B. DETERMINE, IN VIEW OF LIMITED RESPONSE FOR 2000-2025 PERIOD, METHODOLOGY FOR PRODUCING FORECASTS FOR THIS PERIOD. (CANADIAN DELEGATE HAD SUGGESTED A REGIONAL APPROACH.)
- C. FINALIZE ARRANGEMENTS FOR COMPUTATIONAL PROGRAMS FOR TRANSLATING NUCLEAR POWER GROWTH PROJECTIONS INTO LIMITED OFFICIAL USE

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- FRONT-END FUEL CYCLE REQUIREMENTS. (IAEA HAD TABLED PROPOSAL FOR FUEL CYCLE COMPUTER PROGRAM FOR INFCE PERMITTING CONSISTENT TREATMENT OF ALTERNATIVE STRATEGY STUDIES AND OFFERED EARLY ASSISTANCE TO FRONT-END STUDIES. U.S. SUPPORTED AGENCY OFFER.)

5. COATES ASKED OECD/NEA AND UK TO PREPARE SHORT "STATUS-STRAWMAN" PAPER ON QUESTIONS 1 AND 2 RESPECTIVELY, TO BE CIRCULATED AS SOON AS POSSIBLE PRIOR TO JULY MEETING. MAJOR PLAYERS AT LONDON MEETING LIKELY TO BE UK, FRG, FRANCE, U.S., NEA AND IEA. (ALL SUB-GROUP COUNTRIES INVITED TO ATTEND BUT UNLIKELY THAT MANY OTHER THAN THOSE LISTED ABOVE WILL ACTIVELY PARTICIPATE.)

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6. LIMITED TIME AVAILABLE PRIOR TO JULY MEETING MAY JUSTIFY SETTING UP AD HOC U.S. TASK FORCE FOR EACH OF AGENDA AREAS TO DEVELOP STRATEGY AND MAXIMIZE PROSPECTS OF ACCEPTABLE POSITIONS BEING TAKEN BY THE SUB-GROUP.

7. SEVERAL QUESTIONS IDENTIFIED FOR POSSIBLE TCC ASSISTANCE, NAMELY RESPONSIBILITIES OF VARIOUS WORKING

GROUPS FOR DEVELOPMENT OF CANDIDATE ALTERNATIVE REACTOR-FUEL CYCLE CHARACTERISTICS, RESPONSIBILITY FOR PROJECTION OF POSSIBLE INTRODUCTION DATES AND PENETRATION RATES OF ALTERNATIVES WITHIN NUCLEAR POWER GROWTH ENVELOPE, DEFINITION OF STRATEGIES FOR WHICH URANIUM REQUIREMENTS WOULD BE ANALYZED, AND POTENTIAL USE OF IAEA COMPUTATIONAL CAPABILITY FOR INFCE ALTERNATIVE STUDIES.

8. SUB-GROUPS B (RESOURCES), C (POLICIES AND TECHNICAL AND SOCIAL CONSTRAINTS), AND D (HEAVY WATER) MET CONCURRENTLY JUNE 1. U.S. PARTICIPATED FULLY IN B (CHAIRMAN BY NININGER) AND C AND ATTENDED THE AFTERNOON SESSION OF D.

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ACTION OES-07

INFO OCT-01 EUR-12 ISO-00 ACDA-12 IO-13 SOE-02 CIAE-00
INR-10 L-03 NSAE-00 NSC-05 EB-08 NRC-05 DODE-00
SS-15 SP-02 CEQ-01 OIC-02 PM-05 AF-10 ARA-10
EA-10 NEA-11 COME-00 EPA-01 INT-05 /150 W
-----085603 061710Z /53

R 061512Z JUN 78
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9. SUB-GROUP B. MAIN ISSUES WERE A) THE APPROPRIATE CUT-OFF PRICE FOR DELINEATING THE LOW-GRADE RESOURCES THAT THE SUB-GROUP WOULD STUDY AND B) THE DIFFICULTIES ASSOCIATED WITH ONE OF THE GROUPS MOST IMPORTANT TASKS-- TO TRANSLATE RESOURCE ESTIMATES INTO TIME-PHASED URANIUM SUPPLY ESTIMATES FOR THE PERIOD THROUGH 2025 (I.E., A PRODUCIBILITY ANALYSIS). RE CUT-OFF PRICE, THERE WAS GENERAL AGREEMENT TO ADD A COST CATEGORY OF \$50 TO \$100 PER POUND OF U3O8 TO THE RED BOOK CATEGORIES. U.S. PROPOSED A \$100-\$300 CATEGORY. MUCH DISAGREEMENT OVER THIS, WITH U.K. TAKING STRONGEST STAND AGAINST U.S. PROPOSAL. SUB-GROUP AGREED TO AT LEAST LOOK AT RESOURCES IN THIS CATEGORY AS WELL AS AT POSSIBILITIES FOR URANIUM FROM SEA WATER. FURTHER INFORMATION ON LOW-GRADE RESOURCES IS TO BE SUBMITTED TO SUB-GROUP BY SEPTEMBER 1978. RE

DEVELOPING SUPPLY ESTIMATES, THERE WAS WIDESPREAD SKEPTICISM BY MOST PARTICIPANTS ABOUT THE FEASIBILITY OF PROJECTING PRODUCTION FROM LOW-GRADE AND UNDISCOVERED RESOURCES (I.E., SPECULATIVE FROM IUREP) FOR PERIOD AFTER 2000. -.. ".""

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10. THE MAJOR PRODUCING STATES AGREED TO TRY TO UNDERTAKE PRODUCIBILITY ANALYSIS AT LEAST UP TO 2000 AND TO GO BEYOND IF POSSIBLE. (AUSTRALIA UNDERSTANDABLY SKEPTICAL ABOUT ITS ABILITY TO PROJECT ITS PRODUCTION FOR PERIOD PRIOR TO 2000 EVEN FROM PROVEN RESERVES.) U.S. TABLED PATTERSON PAPER WITH ARBITRARY NUCLEAR GROWTH FORECASTS FOR INTERIM URANIUM REQUIREMENTS ANALYSIS. UK AGAIN CALLED FOR HIGH GROWTH PROJECTIONS. FRG URGED THAT YELLOW BOOK ACCELERATED TREND SHOULD BE USED IN INTERIM, EVEN THOUGH SUB-GROUP 1A/2A QUESTIONNAIRE RESPONSES WERE FAR LOWER.

11. SUB-GROUP C (POLICY AND TECHNICAL AND SOCIAL CONSTRAINTS). MEETING LASTED ONLY THE MORNING, PRIMARILY BECAUSE THEY HAVE NOT DONE MUCH WORK SO FAR AND IT IS NOT CLEAR HOW MUCH THEY EXPECT TO UNDERTAKE. THE MAIN TOPIC WAS THE QUESTIONNAIRE WHICH WAS SENT OUT IN LATE APRIL. EIGHT COUNTRIES HAVE SUBMITTED RESPONSES AND TEN MORE, INCLUDING U.S., PROMISED TO HAVE RESPONSES IN BY JUNE 30. THE CO-CHAIRMEN AGREED TO TABULATE THE RESPONSES AND TO WRITE REPORT ANALYZING THE RESULTS. (THE LATTER WILL BE DONE MAINLY BY MICHAEL DAVIS OF THE EC.) THE REPORT WILL BE PRESENTED TO WG-3 EITHER AT THE JULY 24-AUGUST 7 MEETING OR IN OCTOBER IT NOT READY FOR JULY 24 MEETING.

12. SUB-GROUP D (HEAVY WATER). MAIN ITEMS OF BUSINESS WERE TABLING OF THREE PAPERS, DECISION ON ADDITIONAL PAPERS TO BE SUBMITTED BY SEPTEMBER 1, 1978, AND THE DRAWING UP OF QUESTIONNAIRE WHICH WILL ASK ABOUT TECHNOLOGIES UNDER DEVELOPMENT, SOURCES OF DEUTERIUM, ENVIRONMENTAL CONSTRAINTS, AND HEAVY WATER REQUIREMENTS. INFO WAS ASKED ABOUT STATUS OF U.S. PAPER ON SAFEGUARDS RE HEAVY WATER. (FIRST DRAFT HAS BEEN RECEIVED; IAEA AND SUB-

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GROUP AWAITING REVISION EAGERLY.) SUB-GROUP STILL HOPES U.S. WILL SUPPLY PAPER ON PRODUCTION AND LOOK FOR HYDROGEN AND METHANE WORLDWIDE. DELEGATION WILL BRING BACK DETAILS

ON THIS.

13. FOR NEXT MEETING IAEA WILL GIVE PAPER ON HEAVY WATER SAFEGUARDS AND CANADA AND ARGENTINA WILL COLLABORATE ON INTERNATIONAL ASPECTS, INCLUDING NATIONAL SELF-RELIANCE AND SHARING OF ECONOMIC RISKS.

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INR-10 L-03 NSAE-00 NSC-05 EB-08 NRC-05 DODE-00
SS-15 SP-02 CEQ-01 OIC-02 PM-05 AF-10 ARA-10
EA-10 NEA-11 COME-00 EPA-01 INT-05 /150 W
-----085471 061710Z /53

R 061512Z JUN 78
FM AMEMBASSY VIENNA
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14. THE PLENARY SESSION PRODUCED NO MAJOR SUBSTANTIVE CHANGES IN THE ACTIVITIES PREVIOUSLY REPORTED IN SUB-GROUP REPORTS. SUBSTANTIAL SKEPTICISM WAS EXPRESSED ON INCLUSION OF SPECULATIVE RESOURCES IN INFCE ANALYSES. A POSSIBLE TCC ISSUE NOT PREVIOUSLY IDENTIFIED IS WHICH WORKING GROUP SHOULD ANALYZE UPPER LIMIT FOR ACCEPTABLE URANIUM PRICE; INDIA SUGGESTED WORKING GROUP 8 AND UK SUGGESTED GROUP 1A/2A. IT IS CLEAR THAT SUB-GROUPS 1A/2A AND B ARE THE KEY GROUPS. C MAY END UP MAKING A FAIRLY MINOR CONTRIBUTION AND FEW COUNTRIES ARE INTERESTED IN D.

15. NEXT DATES FOR MEETINGS ARE: SUB-GROUPS 1A/2A AND D, OCTOBER 16; SUB-GROUPS B AND C, OCTOBER 17; WG-1 PLENARY, OCTOBER 18. SMITH

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Message Attributes

Automatic Decaptioning: X
Capture Date: 01 jan 1994
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: MEETINGS, NUCLEAR FUELS, NUCLEAR POWER PLANTS
Control Number: n/a
Copy: SINGLE
Draft Date: 07 jun 1978
Decaption Date: 01 jan 1960
Decaption Note:
Disposition Action: RELEASED
Disposition Approved on Date:
Disposition Case Number: n/a
Disposition Comment: 25 YEAR REVIEW
Disposition Date: 20 Mar 2014
Disposition Event:
Disposition History: n/a
Disposition Reason:
Disposition Remarks:
Document Number: 1978VIENNA05120
Document Source: CORE
Document Unique ID: 00
Drafter: n/a
Enclosure: n/a
Executive Order: N/A
Errors: N/A
Expiration:
Film Number: D780236-0505
Format: TEL
From: VIENNA USIAEA
Handling Restrictions: n/a
Image Path:
ISecure: 1
Legacy Key: link1978/newtext/t19780684/aaaacucw.tel
Line Count: 273
Litigation Code IDs:
Litigation Codes:
Litigation History:
Locator: TEXT ON-LINE, ON MICROFILM
Message ID: 5ec7cc8f-c288-dd11-92da-001cc4696bcc
Office: ACTION OES
Original Classification: LIMITED OFFICIAL USE
Original Handling Restrictions: n/a
Original Previous Classification: n/a
Original Previous Handling Restrictions: n/a
Page Count: 5
Previous Channel Indicators: n/a
Previous Classification: LIMITED OFFICIAL USE
Previous Handling Restrictions: n/a
Reference: n/a
Retention: 0
Review Action: RELEASED, APPROVED
Review Content Flags:
Review Date: 05 may 2005
Review Event:
Review Exemptions: n/a
Review Media Identifier:
Review Release Date: N/A
Review Release Event: n/a
Review Transfer Date:
Review Withdrawn Fields: n/a
SAS ID: 2445877
Secure: OPEN
Status: NATIVE
Subject: INFCE: WORKING GROUP 1 MEETING
TAGS: TECH, ENRG, IAEA, INFCE
To: STATE
Type: TE
vdkgvwkey: odhc://SAS/SAS.dbo.SAS_Docs/5ec7cc8f-c288-dd11-92da-001cc4696bcc
Review Markings:
Sheryl P. Walter
Declassified/Released
US Department of State
EO Systematic Review
20 Mar 2014
Markings: Sheryl P. Walter Declassified/Released US Department of State EO Systematic Review 20 Mar 2014